Follow-up Evaluation:

Lessons Learned about Capacity Building

Population and Public Health Branch
Manitoba and Saskatchewan Region

Health Canada Santé Canada

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Population and Public Health Branch
Manitoba and Saskatchewan Region

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A. Introduction

This report presents the results of a follow-up evaluation of two workshops sponsored by Health Canada's Population and Public Health Branch, Manitoba and Saskatchewan Region (PPHB). A workshop on evaluation was held in September 2001 and a partnership development workshop in September 2002. Evaluations were conducted at the completion of each workshop. Specifically, the follow-up evaluation, conducted early 2003, focussed on two fundamental questions:

Were the workshops efficacious in increasing knowledge and skills in either evaluation or building and sustaining partnerships, as well as shifting attitudes towards either evaluation or partnerships?

What PPHB actions were perceived by participants to be helpful or hindering, from the perspective of their project work?

PPHB staff also want to improve their practice of supporting projects and saw this follow-up evaluation as an opportunity to gather information that could provide insights into their practice. PPHB staff recognise it is necessary to gather information from many projects over time to answer this more complex and important question. However, it was anticipated that this evaluation would be able to inquire about helpful and hindering actions and that over time and over many projects, information can be gathered that would be helpful to improve practice.

The evaluation format used a framework created by Michaela Berkowitz (see Appendix A), adapted from Kirkpatrick's four-level framework for evaluating adult education and training, along with other theorists. Kirkpatrick's framework identifies four primary levels that can be evaluated:

- **Reaction** (level 1) to workshop ideas and content;
- **Learning and Retention** (level 2);
- **Application** (level 3) or use of tools and concepts; and
- **Results** (level 4) or a generalized application of tools and concepts in practice outside the initial purpose for which they may have been learned.

Using these four levels, the evaluation team for both workshops identified a series of primary evaluation issues and indicators for the evaluation process. From the evaluation framework (see Appendix B), a common interview guide was developed so that the two evaluations could be integrated and results from both evaluations used to answer the two primary research questions.

This report presents the results of both follow-up evaluations completed with participants from the evaluation workshop and the partnership development workshop. The section that follows highlights the supports that projects appreciate to build their capacity to do evaluation and partnership development. An overall analysis of the findings is followed by a series of recommendations on how PPHB can best support projects in doing their work.

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B. Executive Summary

(I) Purpose

The Population and Public Health Branch (PPHB), Manitoba and Saskatchewan Region conducted a follow up evaluation of two workshops that were organized by the region. Central to the work of PPHB is its role in the area of community capacity building in order to strengthen the work of funded projects. The purpose of the follow up evaluation was to assess the effectiveness of two workshops intended to enhance capacity.

There were two workshops held one year apart; the first was a two day evaluation workshop, in September, 2001, focussed on using a program logic model for planning and evaluation. Participants in the workshop were primarily from the projects funded through Health Canada's Canadian Diabetes Strategy, Prevention and Promotion stream.

The second workshop, on partnership development, was designed to assist Saskatchewan based community groups and organizations in the integration of partnership development strategies in their work. Participants came from community-based organizations, regional health districts, universities and government departments. The majority of the participants were from projects supported by PPHB funding programs.

(II) Methodology

Evaluations were completed at the end of each workshop. The follow up evaluation was conducted four months after the partnership development workshop and seventeen months after the evaluation workshop. The follow up evaluation examined two key questions:

1. Were the workshops efficacious in increasing knowledge and skills in either evaluation or partnership development? And were the workshops effective in shifting attitudes?

2. What PPHB actions were perceived to be helpful or hindering in supporting community projects?

Since the evaluation workshop was small, six of the eight projects that participated in the workshop were interviewed. The remaining two projects had a complete staff turnover.

The partnership development workshop had 84 participants. For the follow up evaluation, interview and focus group samples were selected to ensure representation from different PPHB funded program areas and different regions of Saskatchewan. Adhering to the sampling criteria, 11 projects were selected to participate. Focus groups were conducted with four projects, with a total of ten participants; and four projects were interviewed by phone with a total of five participants.

Interviews were tape recorded with the permission of interviewees, and tapes were then transcribed for the data analysis. The data analysis used a framework created by Michaela Berkowitz (see Appendix A), adapted from Kirkpatrick's four-level framework for evaluating adult education and training. Kirkpatrick's framework identifies four primary levels that can be evaluated:

- **Reaction** (level 1) to workshop ideas and content;
- **Learning and Retention** (level 2);
- **Application** (level 3) or use of tools and concepts; and
- **Results** (level 4) or a generalized application of tools and concepts in practice outside the initial purpose for which they may have been learned.

Using these four levels a series of primary evaluation issues and indicators were identified. A common interview guide was developed so that the evaluations of both events could be integrated and used to answer the two primary questions.

(III) Results

The results are organized using the four levels outlined in Kirkpatrick's theory for evaluating adult education.

Reaction (level 1): With one exception, all projects interviewed that participated in the evaluation workshop felt that the workshop was very helpful in focussing the work of the projects. For those projects that were well grounded in planning and evaluation, the workshop was useful in reinforcing their current thinking and practice. For others it was effective in assisting them to examine, clarify and focus their program plans more effectively and create more realistic and manageable projects.

It is important to take into account the respondents' previous experience with partnership development when considering their satisfaction with the workshop. Respondents' who described themselves as "very experienced" in the area of partnerships expressed their appreciation of the small group work that allowed for practical application of real-life examples and served to push people's thinking about potential diverse partners. However, for two participants who were new to partnership development, the small group exercises on Day 1, using a volunteer member's project as an example, was disappointing because it did not pertain to their work. For one respondent, the exercises had no direct application.

Learning and Retention (level 2): All projects participating in the evaluation workshop could recall key concepts from the workshop 17 months later. All could describe the purpose of a logic model and could identify the difference between goals, objectives and activities. Some had used the logic model to describe their programs to others. Of the three projects that had good to excellent foundations in program evaluation, one made no changes in their program or evaluation plan subsequent to the workshop; one made minor changes; and one made substantial revisions in their program plan and significant changes in their evaluation plan.

After four months, there is evidence from the interviews that all projects participating in the partnership workshop could recall key concepts about the steps in partnership development and some respondents demonstrated a change in attitude and knowledge as a result of attending the workshop.

Application (level 3): As a result of attending the evaluation workshop four of the six projects made changes to their evaluation design. All projects completed a mid-term evaluation as required by PPHB. Specifically, three of the projects used a formative evaluation approach which provided them with on-going feedback, encouraged their efforts and afforded them an opportunity to revise program activities to better achieve their objectives. Seventeen months after the workshop, all participants suggested that they were more secure in their knowledge and skills in evaluation. A sense of importance and usefulness of evaluations was enhanced and there was evidence of a greater commitment to evaluation. Based on the interview data, four of the projects had a positive attitude toward evaluation as a result of the additional training, the requirement by PPHB to complete evaluation work, and the experience of successfully using evaluation results to improve project action.

Since only four months had passed since the partnership workshop not all respondents had the opportunity to put workshop learning into practice. However, there is some evidence of application of some concepts related to "doing your homework" (Step 1) and to the evaluation and enhancement of current partnerships (Step 3). For example, experienced respondents have used some of the tools in both informal and formal ways to examine partnerships that were contributing to their project and those partners that were simply a drain on their resources. In terms of a shift in attitudes, experienced respondents said that the workshop served to support and confirm their views. For those with less experience there was a broadening of views on the components of successful partnership development.

Results (level 4): According to Kirkpatrick, the fourth level is where participants generalize their application of learning to other projects. As a result of the evaluation workshop, one participant indicated this level of generalized ability by describing her entire program within a logic model framework, and eventually made changes to her evaluation procedure and activities. As a result of the initial evaluation findings, significant changes were made to the program activities to increase their impact.

This level of generalized ability was not evident as a result of the partnership development workshop. Since the workshop only occurred four months prior it does not seem reasonable to expect this kind of result.

(IV) Recommendations for Practice

One of the reasons for undertaking this evaluation was to assess capacity building practices of PPHB and provide recommendations to improve support to funded projects. Based on the interviews and analysis the following recommendations are offered:

1. Continue to provide opportunities for continued education and training, in part through a workshop format.
2. Carefully assess learning needs when planning educational events.
3. Ensure that community partners are involved in the planning and delivery of training and education events
4. Support offered by program consultants is beneficial and should be continued.
5. Additional supports to enhance capacity should be provided.
6. Evaluation must continue to be a requirement of funded projects.

(V) Conclusion

The results of the follow up evaluation support the notion that workshops are efficacious in increasing knowledge and skills, as well as shifting attitudes towards practice, in this instance in the areas of evaluation and partnership development.

The evaluation results provide insight into capacity building practices of PPHB and suggest that current practices are perceived as supportive and helpful to funded projects in pursuit of their goals. This evaluation was simply a snapshot of capacity building work and in order to fully answer the question about the ways in which PPHB can improve their practice, information from projects would need to be gathered and analysed over a longer period of time.

C. Evaluation Workshop Results

Workshop Description

In September 2001, PPHB provided a two-day workshop focussed on using Program Logic Models for planning and evaluation. Workshop participants included projects funded through the Canadian Diabetes Strategy (CDS), as well as some selected newly funded projects from the Population Health Fund. The workshop was primarily designed for the projects funded through CDS, since this funding began in August 2001. The purpose of conducting an evaluation workshop at the initial stage of funding was to provide the groups with the knowledge, skills, and time to implement an evaluation of their project from the onset. All travel and workshop expenses were covered by PPHB. The facilitator, two PPHB staff and two consultants responsible for the CDS national evaluation assisted 14 participants from eight projects. One participant was a staff leader in a related project but wanted to attend the workshop for her own capacity building purposes.

Because the workshop had so few participants, the facilitator and resource people were able to establish a very rich learning environment. Participants were asked to bring their original proposal and initial evaluation plans. Due to participant/resource person ratios and the availability of planning materials, participants were able to spend considerable time working specifically on their own program and evaluation plans. The ability to immediately apply concepts from the workshop improved participants' learning. Many participants were able to leave the workshop with considerable insight on planning and evaluation processes.

The workshop had three primary objectives:

Participants will:

1. Describe the logic of their program goals and activities;
2. Identify key elements in their program evaluation activities;
3. Plan their evaluations including identifying desired outputs, outcomes, and linked indicators, and outline evaluation data collection methods using a program logic model approach.

Follow-up Evaluation Methodology

For the purposes of the follow up evaluation, representatives from six of eight projects who participated in the evaluation workshop were interviewed. The remaining two projects had a complete staff turnover. Out of 14 participants, eight were interviewed. Three had moved on to other projects and were unavailable for interview and three were partners in projects' activities where interviews were conducted. Interviews were tape recorded with the permission of interviewees. Tapes were used to create the data analysis charts; these were then used for the preparation of reports.

It should be noted that two of the fourteen participants at the evaluation workshop had experience in evaluation, either as a result of post-graduate training or through extensive work experience in fields where evaluation is widely used (e.g., secondary education). As a result of this prior experience, two participants did not feel that attending the workshop provided them with a rich learning experience. This needs to be taken into account when examining the data from the evaluation follow-up interviews.

Limitations of the Data

There were a small number of workshop participants available for follow-up interviews, thus creating potential for not reaching data saturation and insufficient data to develop trustworthy themes. As well, the person conducting the interviews facilitated the workshop. This introduces potential bias in interview responses or interpretation of data. To mitigate these problems, extensive use has been made of quoted materials in the report and special attention has been paid to negative cases. The rationale for having the facilitator conduct interviews is that the facilitator was very familiar with the workshop content and could probe well, and that a previous positive relationship with workshop participants had been established during the workshop. As well, the focus of the evaluation was on the use of information from the workshop, not on the workshop itself. In introducing the interview, each respondent was told that the primary purpose was to evaluate the project support practices of PPHB, in particular the usefulness of a workshop format in enhancing knowledge and skills.

Findings

Interview results will be described using the primary evaluation questions and issues that were identified by the team in the evaluation framework. Answers to individual questions in the guide during the data analysis process were keyed back to these major issues to the evaluation framework. Major sections are based on Kirkpatrick's four levels and factors that helped and hindered projects. PPHB practice that helped and hindered projects, and unanticipated outcomes are presented in Section D of the report.

Reaction

Satisfaction with Workshop: Results of the On-Site Evaluation

The initial reaction of participants to the workshop was quite good with six participants being very satisfied and four (4) participants satisfied. As well:

- Participants felt that they had a strong learning experience (very valuable = 6, valuable = 4)
- The usefulness of the workshop was rated very highly (very useful = 9, useful = 2)
- The instructor was knowledgeable about the subject matter (strongly agreed = 9, agreed = 2)
- The instructor was interesting (strongly agreed = 8, agreed = 2)
- Discussion was encouraged (strongly agree =11, agreed = 1)
- Participants felt that their knowledge of evaluation was enhanced (enhanced = 5, somewhat enhanced = 6).

Participants generally had agreement or strong agreement that the subject matter was well-organized, centred on relevant problems and discussions, that teaching aids enhanced learning, and that activities were helpful in applying the information that was being learned.

Despite the workshops rich learning environment, participants' comfort level in completing their evaluation was still not high at the end of the workshop (somewhat comfortable = 3, moderately comfortable = 6). Participants felt for the most part that the time allotted for the workshop was adequate for the material covered. Given the fact that participants were able to work directly on materials of specific interest and relevance to them and their projects, and had access to excellent quality sustained coaching, the ratings of satisfaction are not surprising.

Satisfaction with the Workshop: Reaction 17 Months Later

With one exception, projects reached in the evaluation interviews felt that the workshop was very helpful in focussing the work of the projects.

Not all project representatives were particularly interested in attending; nearly all perceived it was a requirement of PPHB. Two projects felt initially that the workshop was not suitable for their learning needs. One felt they had extensive evaluation experience and expertise available to the project. In the other case, the project felt that it was difficult to attend a planning and evaluation workshop as their project had been operating for nearly two years, funded by another source. PPHB funds were used to supplement selected project activities. Two additional participants indicated at the beginning of the workshop that they "hoped that it wouldn't be a complete waste of time".

Despite the level of encouragement or implied requirement that was applied, several participants changed their mind about the workshop's usefulness. One of the two individuals who had been concerned about wasting her time had a significant positive change in professional practice as a result of attending. Other participants felt that it might not be essential for their project but that it was beneficial in general. Two final participants felt that it was unnecessary as their project had well established planning and evaluation process in place, had good expertise in evaluation from previous professional activities, and routinely used evaluation to revise and refine project activities. By the end of the workshop, these two individuals felt that while the workshop was not beneficial for them, it was important for the other projects that were not as well-versed in evaluation.

During interviews, projects well grounded in planning and evaluation felt that the workshop was useful, if only because it reinforced their current thinking and practice. For four projects, the workshop was effective in helping them to examine, clarify and focus their program plans more effectively, and create manageable projects that were more realistic, more likely to succeed, and more easily evaluated.

In terms of valuing the importance of evaluation and understanding evaluation processes, all projects reported some impacts. One project examined more closely their evaluation forms and included additional questions. Another project indicated, "Before the workshop we had really not focussed on changing our health care team and what that meant. We may not have been clear on that until almost too late in the project [without the workshop]." Two other projects were able to clarify their projects' focuses.

"I realized how broad and vague the project was...it was huge. As we tried to draw it out, the logic model helped us to focus more...it really shifted things for us. Our plan really became more specific and we targeted three things to work on."

One project had difficulty because they were halfway through ther project at the time of the of the workshop and found it difficult to apply the logic model to an existing project. However, this project did revise its project plan, sharpened its evaluation process, and focussed its indicators better. For another project, an external evaluator was on contract to work with the project from its inception [1].

Finally, for one project, the additional description of how the Saskatchewan projects would fit into the national evaluation scheme for the CDS was helpful. "I really appreciated seeing the bigger national picture and the national logic model. I need to know where I belong. In this work it's nice to know you're feeding into something bigger."

Other positive aspects of the workshop were:

"The logic model really fit well for me. I think that way and it's nice to have a graphic representation of how things work."

"Having [evaluators for the CDS] in my small group was great, we had a chance to develop our program logic model well because of it. At another workshop where we did not have the chance to apply the information directly to our own project, I have hardly used that information. I've used the logic model more-a hundred times more."

[1] PPHB supports the use of external evaluators up to 10% of the total budget, and encourages projects to build their capacity even if using external evaluators. This capacity-building orientation was the primary purpose of the workshop.

Learning and Retention

Can recall [2] key concepts

There is evidence from the interviews that all projects participating in the workshop could recall key concepts from the workshop after 17 months. All interviewees [3] could identify the difference between a goal, an objective, and an activity, describe the purpose of a logic model, and discuss how they had used a logic model. In some cases they also had used the logic model to describe their program to others that had not attended the workshop.

"An activity is what you do to reach an objective."

"I can close my eyes and see a little picture in my head of the program logic model."

"Well we had to go home and explain it [the logic model] to others, well that took a good day to do that..."

Have learned [4] key concepts

By their answers, interviewees indicated that they had learned the fundamental concepts of the logic model, although one project made no effort to use the logic model in its program activities. One individual in particular found the workshop very helpful.
"I learned that objectives have to be more focused on what would be 'different'. That changes the objectives completely. In university I learned how to write SMART objectives. At the workshop I discovered I could have a SMART objective and still not make a difference... After the workshop... I realized that the goals and objectives we had set were too high. We made changes that made the project more attainable...I had a better grasp of what I had to do."

Of the three projects that had good to excellent foundations in program evaluation, one made no changes in the program plan or the evaluation plan subsequent to the workshop. One made minor changes to one evaluation instrument but did not otherwise use the concepts from the workshop in evaluating their educational interventions. The third project made substantial refinements and revisions in its program plan and made significant changes therefore in its evaluation plan.

Application

Applied concepts to create the evaluation design

Four out of six projects attending the workshop changed their evaluation designs.

"We spent quite a bit of time after the workshop redoing the logic model because we weren't satisfied with the one from the workshop... We had to re-evaluate our objectives; sometimes our objectives are difficult [to measure] and determine whether we are achieving our objectives. Working through the logic model forces you to actually sit down and work through the process. You know that it's good to do, but you don't do it due to time pressures. This was a new and helpful way to do things."

One project used what it had learned from the workshop to review their evaluation design and making changes to their data collection tool. Another project made no changes.

[2] Recall is "to recollect or to remember" Canadian Oxford Dictionary, ed.1998.
[3] One interviewee did not attend the workshop, but was interviewed to see if any ripple from the workshop had occured in the project.
[4] Learning is defined as "acquire knowledge or skills; acquire or develop a particular ability" Canadian Oxford Dictionary, K. Barber, ed. 1998.

Efforts to carry out evaluation and use findings

According to the requirement of PPHB all projects undertook a mid-term evaluation. Three projects used a formative evaluation approach with on-going feedback from project events informing subsequent plans or events. In two cases, the evaluation findings were of substantial benefit in encouraging staff efforts in project activities.

"At the beginning it [the evaluation] was a burden. However, after going back and implementing the changes based on our evaluation results, the feedback we got was really positive. ... The staffs feels really supported now due to the changes we made in the program because of their feedback and because of feedback from our system. Now we have some place to refer to when we think about making change...for example, we knew the referral process was not working well and so we made changes until it worked better."

"The progress report [evaluation report] we mostly used for ourselves and to keep the staff on task. The program logic model was very helpful in doing that...it also helped to keep in mind things that had been planned but not actually done. Eventually, we went to a monthly reporting system and it was based on the logic model also."

Three other projects used a mid-term reporting process. Two of these three revised their program activities to achieve project objectives better.

"It [evaluation report] changed my expectation of both the staff and the youth in how quickly they would progress. i knew it would be a long-term process...that we would have to go slower than we anticipated. ... I also realized we needed more adults involved for the youth. ... If we were not forced to do the evaluation, I wouldn't have done it due to busyness. It may have taken a lot longer and we might have wasted a lot more time in making changes. But there it was in black and white and I couldn't deny it."

In one project, parents participated as part of an education team, for a variety of empowerment as well as educational reasons. In the mid-term evaluation report:

"We discovered that the professionals didn't take the parents as seriously as they could have.... Our credibility wasn't very good in the 'educational institution'. ... The students reacted very well when the parents came in ...the project was doing more to make change with the parents [rather than the students] than we had thought."

The project then found a partner organization that could provide professional educators. These staff replaced parents in their educational role. Parents introduced the professionals in the classrooms, and then the professionals did the teaching. This project also used the evaluation results to confirm what they were doing right.

Five of the six projects involved in the workshop used evaluation results to change the course of their projects, and, in their estimation, improve both project operations and the likelihood of achieving short and long-term objectives. The sixth project has had a process over its three-year life span of using evaluation results to assess the efficacy of its activities and to plan for the subsequent year.

Changes in evaluation attitudes, knowledge and skills applied to the project

All participants interviewed acknowledged that prior to the workshop, they knew the value and importance of evaluation, but only some would have carried out evaluation if it were not a required part of the project funding predominantly because people said they were too busy.

During the interview process to assess change in attitudes, knowledge and skills, all interviewees were presented with an analogy. A swimming pool called 'evaluation' was described as having a shallow end

with steps with guardrails, a middle section where the pool floor sloped dramatically, and a deep end of 12 feet of water. The deep end was equipped with a regular diving board and a high diving board. All participants were asked to assess their comfort with doing evaluations prior to the workshop based on where they were in the pool. Three described themselves as "standing in the shallow end, really close to the side", "hanging on to the guard rails", and "dangling my big toe in the water [of the shallow end]". One interviewee described herself as being "around the middle of the pool" and one identified she was "swimming comfortably in the deep end". Three described themselves as being confident enough to use the high diving board.

Right after the workshop, all participants describe themselves as being in the water. Shallow end swimmers were moving more confidently through the shallow end, or going toward the middle of the pool, while others were moving confidently in the deep end or on the high dive board.

Seventeen months after the workshop, all participants describe themselves as moving either to the middle of the pool or to the deep end of the pool, with one more describing herself as being a high diver. For all participants and each project, both the workshop and the required evaluation report affirmed the importance and usefulness of evaluation in project activities. One individual described this change in attitude like this: "I still have to force myself to do it [evaluation] or be forced to do it. I have seen more and more that it is a difficult but necessary ... part of the work."

Among the key changes reported is the following experience:

"It [evaluation] is not my favourite thing to do, I'd rather be the one to gather raw data and then turn it over to someone else. I appreciate having the support from the deep end swimmers. You know me, I want to be a doer; I don't have a passion for evaluation... [Now] when you learn a little bit more you realize that you can do some of it... and you support the process more because you understand the process more."

Comfort and confidence levels improved. Participants understood the importance and usefulness of evaluations, and gave evidence of greater commitment to evaluation. As well, some participants show indications of growing sophistication in evaluation practice. The project quoted below struggled most with its indicators and methods during the workshop; it went on to create a third generation evaluation plan following the workshop.

"To measure change in the work that we do is very difficult.... We really don't have the resources...then we learned to match the evaluation to the resources. In the kind of work we are doing, it's very hard to attribute any change that happens to the project, or to create a change if the environment is not supportive. Evaluation is very hard in these situations."

Five of the participants least comfortable with evaluation indicated in the interview that they now believed that evaluation is so important that in future projects they would ensure that it was done from the beginning. Three participants came to the workshop with a strong commitment to evaluation and had prior experience in evaluation. One of these more experienced practitioners said: "I feel more confident now, I learned a lot... I learned how to figure out what to measure specifically... to 'measure less better' [a phrase used by a workshop presenter]."
From the interview data, one can conclude that four of the projects would not have such positive attitudes towards evaluation without the combination of additional training, the requirement to complete evaluation work, and the experience of successfully using evaluation results to improve project action.

Results

Kirkpatrick argues for the inclusion of a fourth level where participants generalize their application of learning to other aspects of their lives or to other projects. One participant indicated this level of generalized ability. This individual chose to describe her entire program and practice (not connected with the PPHB project) within a logic model framework. Over the next several months, the individual created two complete drafts of the logic model and began to change her evaluation procedures and activities. As a result of initial evaluation findings, she went back to again revamp her program plan as she had discovered that some of the program activities were not having much impact.

This practitioner has also used program logic models in two additional activities as well as persuading all of her provincial counterpart colleagues to engage in a planning workshop to learn how to better use logic models. In one working committee that was experiencing considerable difficulty and lack of productivity, the use of logic models had a positive impact on the group. She applied the logic model to an additional project:
"In terms of the actual goal I was looking at...[we] were not really clear on what we wanted to achieve. I had to really think in terms of outcomes that I was looking for. I discovered that I wanted to see if the kids had really changed their eating patterns, yet I had not asked a single question about that in the evaluation...now I get good useable data from the program, it [logic model] has made the evaluation very specific and useful."

Four individuals interviewed indicated that they felt more knowledgeable and therefore more confident to use evaluation in other projects or programs and to recommend evaluation to others, both colleagues and community members. One of these individuals described her ability to create a basic evaluation plan based on "a good plan that comes from the community, and then taking on partners if you need them... thinking about sustainability... and what you want to accomplish.... It [Evaluation] is absolutely essential...I suppose if you didn't do it you could be lucky, not wind up wasting your time, but you wouldn't really know it without an evaluation."

Factors that Helped and Hindered Projects

All projects were asked about what factors had helped their project attain its current results as well as what factors had hindered results. This provided a link in the interview process to draw out comments about PPHB practice, and what about it was helpful or hindering.

Factors that helped projects

Most respondents described elements that were internal to project operations. For example, one project described that it had been able to get a lot of good community publicity and this assisted greatly in recruiting volunteers. With an increase in volunteers, it was possible to interact with more of the target population. Other types of supports internal to projects were good feedback from the community that helped the project stay on track, being able to obtain either quality staff or quality volunteers, and being able to obtain good community support.

Four of the six projects indicated that the workshop provided by PPHB was a considerable help in focussing their project on "more realistic expectations", " a more narrow focus in order for the project to be more do-able ... targeting program objectives and activities more." As well, the evaluation results were very helpful for five out of six projects in reorganizing and refocusing program activities to increase effectiveness.

Three projects used external evaluators, and in two cases these projects perceived this to be of great assistance.

"Working with the professional evaluator, walking along side her, we learned how to develop questionnaires. We worked with the results in interpreting them and putting them in context.... The training we received [doing things this way] was very helpful... it not only helped us to know new ideas, but also what we were doing right. The parents felt good, they felt included...overall it helped us to feel more confident."

The PPHB funding, particularly for those projects that received additional funding at the end of their first year of operation, was very helpful. In five out of six cases, the projects would have never gone forward without PPHB's funding support. The sixth project might have proceeded, but perhaps in a somewhat more limited fashion. Further comments on other PPHB project support practices are found in Section D.

Factors that hindered projects

Projects typically indicated factors that had hindered them as being either internal to the project or related to the process of making change. Interviewees identified:

- staffing, "finding people that were both qualified and willing to do the work..."
- the nature of making change within the target group
- making change on two or more aspects of the organization at one time
- having a mid-stream change in the way the project had to be organized due to funding reasons.

Nearly all projects stated that receiving funding on a short to mid-term basis (i.e., 1-3 years) does not match projects' needs for support. As well, for one project, the PPHB funding came mid-stream in the project and the evaluation workshop caused the project to undergo some major rethinking. This proved in the long term to be beneficial, but was difficult for the project during this transition period.

D. Partnership Development Workshop Results

Workshop Description

PPHB provided a two-day workshop on partnership development in September 2002. The workshop was designed to help Saskatchewan-based community groups and organizations integrate partnership development in their projects - with a view to ensuring the capacity and sustainability of PPHB-funded projects. Funding for many of the projects ended March 31, 2003. All travel and workshop expenses for the funded projects were covered by PPHB. There were 84 participants. Additionally, four PPHB program consultants and the facilitator acted as resource persons on an as-needed basis for small groups who might require support to carry out their tasks.

Participants came from community-based organizations, regional health districts, universities, provincial government, federal government, educational system and health facilities (e.g., acute care, long-term care). Many participants were part of projects supported by PPHB funding programs including the Population Health Fund, Canadian Diabetes Strategy, AIDS Community Action Program, Hepatitis C Program, Rural and Remote Health Innovations Initiative, Fetal Alcohol Syndrome, Canadian Prenatal and Nutrition Program and Community Action Program for Children.

The goal of the workshop was that workshop participants would implement a partnership development strategy designed to sustain their work. The workshop had five objectives.

By the end of this workshop, participants will have:

1. Built on their existing understanding of how to integrate partnership development and community capacity-building into their population health work, using "How our programs affect population health determinants: A workbook for better planning and accountability" (Ron Labonte, 2002) as a starting point,
2. Applied tools designed to develop, sustain, evaluate and terminate, if appropriate, partnerships,
3. Identified or renewed opportunities to develop partnerships in Saskatchewan and elsewhere, and
4. Developed the beginnings of a partnership development strategy for their population health project that allows them to build community capacity and work towards project sustainability.

Three months after the workshop, participants will have:

5. Implemented a partnership development strategy for their project.

The original intention was to hold a workshop for approximately twenty participants. But in an attempt to be more cost-effective, the actual number of participants more than quadrupled. The fact that the workshop had so many participants posed some challenges to providing a rich learning environment. However, the curriculum did incorporate activities designed to ensure the workshop would be highly interactive and that participants would have an opportunity to apply and share lessons learned. Participants were pre-assigned for the majority of small group activities to ensure a diversity of perspectives.

Follow-up Evaluation Methodology

A total of eight of eleven potential projects meeting the sampling criteria were interviewed during January 2003. The sample was representative of the different program areas funded by the PPHB, and of the different regions of Saskatchewan. Of the 11 projects respecting the sampling criteria, five were targeted for focus groups while the remaining six were identified for individual phone interviews. In person focus groups were conducted with four projects, with a total of ten participants; and four projects were interviewed by phone with a total of five participants.

Interviews were tape recorded with the permission of interviewees, and tapes were then transcribed for data analysis.

It should be noted that four of the projects described themselves as very experienced with partnership development prior to attending the workshop while three of the projects identified themselves as having little or no experience and one said that they had a fair bit of community development experience yet unfamiliarity vis-vis partnership development concepts. This needs to be taken into account when considering the data generated from the follow-up evaluation.

Limitations of the Data

A small number of workshop participants were selected for the follow-up interviews, thus creating potential for not reaching data saturation and for not having sufficient data to develop trustworthy themes. However, steps were taken to ensure the sample was representative of the different program areas funded by the PPHB, and of the different regions of Saskatchewan.
The person conducting the interviews, and contributing to the analysis of the findings, was a PPHB evaluation consultant, though not directly involved in the planning of the workshop. This introduces potential bias in interview responses or data interpretation. As well, one of the persons analysing the interviews facilitated the workshop. This introduces potential bias in data interpretation.

To mitigate these problems, extensive use has been made of quoted materials in the report and special attention has been paid to negative cases.
Another data limitation is that information was collected only four months after the workshop was delivered. There has thus been little time for participants to apply what they have learned; this needs to be considered in interpreting the interview results.

Findings

Interview results will be described using the primary evaluation questions and issues that were identified by the team in the evaluation framework. During the data analysis process, answers to individual questions in the interview guide were linked back to these major issues in the evaluation framework. Major sections are based on Kirkpatrick's four levels and factors that helped and hindered projects. PPHB practice that helped and hindered projects are presented in Section D of the report.

Reaction

Satisfaction with Workshop: Results of the On-Site Evaluation

The initial reaction of workshop participants to the workshop was positive with the majority expressing satisfaction with both days.

Day 1: September 17th
The 63 participants who completed an evaluation form indicated their level of satisfaction (on a scale of 1 to 5, with 1 being "unsatisfied" and 5 being "very satisfied"). The findings indicate that most of the participants were satisfied with the plenary sessions, the small group exercises using a volunteer member's project, the application exercise of Steps 1 and 2 to individual projects (action plan), the facilitator, the resource persons and the handouts.

When asked what they liked most about the day, many participants identified that the opportunity to work in small groups allowed for networking opportunities and information sharing specific to the project that was being presented. Most participants appreciated opportunities for partnerships, information sharing and discussions.

When asked what they liked least about the day, a number of participants suggested that break out rooms for small groups would have solved the noise level problem. A few participants said that they felt rushed and would have liked to spend more time working on their own project, applying the partnership exercises. A couple of participants felt that their group was off track, and they spent more time explaining the existence of their project rather than focussing on partnership development. The role of the resource persons (as discussed on page 14) was unclear to a number of participants.

Participants were asked to provide suggestions for improving the workshop. A few people said that they would like full group discussion following small group exercises. Others said that they would use the resource persons to facilitate the small groups, which might move the process more consistently. Individual participants suggested both shortening the session to half a day and lengthening the workshop to four days, distributing materials in advance and allowing similar interest groups to work together.

As a result of the day's evaluation results, adjustments were made to the next day's agenda by providing more time for full group discussion following most small group exercises. The role of the resource persons was clarified. The issue of break out rooms could not be addressed due to financial constraints but efforts were made to spread out the tables in the room in an attempt to reduce the noise levels.

Day 2: September 18th
Most of the 56 participants who completed the evaluation form were satisfied with the plenary sessions, the small group exercise on leadership, roles and responsibilities, the small group exercises on conflict resolution, the facilitator and the resource persons. Fewer were satisfied with the application exercise on Step 3 (action plan) and the networking bingo.

When asked what they liked most about the day, the majority of participants said that they appreciated the small group work and particularly liked that the groups changed for the second day as it gave them the opportunity to meet more people. A number of participants said that the presentation and discussion on conflict resolution was useful. And several participants noted that networking was what they most appreciated.

Statements	No response	1 (strongly disagree)	2	3	4	5 (strongly agree)
Having attended this workshop, I have a better understanding of how to integrate partnership development and community capacity-building into my population health work, using the Labonte workbook as a starting point.	n=3	n=1	n=2	n=16.5	n=27.5	n=7
Having attended this workshop, I can now apply tools to help me develop, sustain, evaluate and, if appropriate, bring closure to partnerships in my population health work.	n=4	n=1	n=6	n=10	n=29	n=7
Having attended this workshop, I have identified or renewed opportunities to develop partnerships in Saskatchewan and elsewhere.	n=3	n=2	n=5	n=8	n=28	n=11
Having attended this workshop, I have developed the beginnings of a partnership development strategy for my project that will allow us to build community capacity and work toward project sustainability.	n=6	n=4	n=6	n=15.5	n=21.5	n=4

When asked what they liked least about the day, a few participants noted that the presentation of the material was too long and needed to be more dynamic to capture peoples' attention. Some participants felt the use of actual conflicts instead of role-playing would have been more effective. Another noted that the scenarios were underdeveloped and the material was at a basic level.

Participants were asked to provide suggestions that would improve the workshop. Significant themes were to use real examples of partnership development including challenges and benefits as part of the plenary presentations and in general provide more examples during plenary, to use real life situations for role plays rather than scenarios, ensure that presentations are more dynamic and this might be addressed by having a different facilitator for each day and more interaction among participants during the two days. Other suggestions included using a wider variety of learning tools, providing a success story from the community where a project continued to have longer term impact in the community because of its partnerships, more time dedicated to action plans or working on your own and focussing the information on material that participants are less likely to access.

Participants were asked to indicate their level of agreement with a number of statements that reflected the key objectives of the workshop. The following table indicates that overall, participants acknowledge that the workshop did meet the stated objectives. However, an area for improvement is on the practical development of a partnership strategy.

Satisfaction with the Workshop: Reaction four Months Later

When asked what brought them to the workshop, participants cited the following reasons most often:· to learn about partnerships; to find out about sustainability and to identify possibilities for continued unding of projects and programs, and; to network.

One person articulated the perception that there was an expectation on the part of the PPHB that the respondent would attend the workshop.

It is important to take into account respondents' previous experience with partnership development when considering their satisfaction with the workshop. Four of the projects described themselves as "very experienced" with partnership development. These projects talked of having developed extensive partnerships before attending the workshop. Three of the projects identified themselves as having "little or no experience" and one project indicated it had a "fair bit" of experience based on its community development experience yet newness to the ideas.

Planning, design and delivery of the workshop

Many participants, particularly those "very experienced" respondents, expressed their appreciation of the small group work that allowed for practical application to real-life examples and served to push people's thinking about potential diverse partners.

"The way they put us into specific groups with people who could be potential partners to further our role as well as others - so that we could all hopefully work together… that was very innovative."

In a similar vein, many respondents also expressed their appreciation of the many networking opportunities afforded by the workshop design and the diversity of participants.
However, for two participants who were new to partnership development, the small group exercises on Day 1, using a volunteer member's project as an example, were disappointing. For the one respondent, these exercises had no direct application to her. However, the design of Day 2 with a different group and different types of application exercises (scenarios, etc.) and more time for her own action plan was more helpful. For the other respondent, exploring one particular project was not helpful:

"A lot of time was put onto that with the assumption that whoever would be there representing the project would do a good job, and it happens that in my group the person was very new, it was really

hard to do the activities based on her project, so I didn't find that meaningful".
In the case of one "experienced" project, participants recommended more community involvement in workshop planning and delivery, so that their experience and expertise could be shared with, and benefit, others.

Some felt less time should be dedicated to conflict resolution. Consider the following comments from two new participants:

"Too much time spent on conflict resolution since we weren't in any formal partnerships yet" and "A quick review of how to deal with [conflicts] would have been enough."

Two respondents were overwhelmed by the amount or type of information provided. From an experienced participant: "Too overwhelming with information - too many topics that couldn't be worked through - like conflict - that's a weekend in itself...". And for one new participant, "I was overwhelmed by how much they talked about formalizing these very detailed partnerships and I still struggle with how we can do that."
Another participant who is new to the concepts of partnership development also alluded to information overload, but also pointed to its usefulness for future reference and in raising awareness.

"It was a good experience for us. There was a tremendous amount of stuff there that really didn't hit where we are, but it was still valuable to be there. Now we know that this is out there so we can draw on it when we need it. Prior to that, we didn't know these things could be issues."

Key concepts presented at the workshop

Other participants' comments as to what stood out for them from the workshop focused on key concepts of the workshop - in relation to all three steps of partnership development, and particularly around conflict resolution.

For two participants, one new and one relatively new to partnership development, the importance of doing your homework as part of Step 1 came through.

"It became clear to me that we needed to get our internal ducks in a row. That needed to be a priority so that we had more to offer our outside partnerships - so that we would be clear about what we would give and to become credible we need to get working internally."

"I think the main thing I learned at the workshop was how much at our organization we need to figure out things out here before we can move on."

For one participant new to partnership development, the resource inventory exercise conducted on Day 1 was a revelation for her, allowing her to recognize that she indeed had something to offer to potential partners - as part of taking stock in Step 1 of partnership development.

"The skill exploration stood out for me - it broadened my sense of what we think of as skills. There are areas of expertise and there is also practical things that come from your life experience..."

For one "new" respondent, thinking outside the box was brought home:
"There was such a diverse group of people at the conference from fields I know very little about. It's kind of neat to have those people... It was eye opening to see the different perspectives and know that we still shared some commonalities in our hopes. I wouldn't have gotten certain things from a group that was more homogeneous. I like that."

In relation to Steps 2 and 3 of partnership development, three "experienced" respondents recalled the usefulness of the conflict resolution section of the workshop, providing insights into their practice.

"It stayed with me about how people interpret things differently."

"...provided insights I hadn't thought of before."
"...that helped me to understand the give and take of a partnership and what kind of areas that can include."

One new respondent liked the perspective of conflict being a part of partnerships and trying to figure out how to handle it before it happens.

Still in the vein of making partnerships work, one participant commented on the usefulness of focussing on leadership, roles and responsibilities.

"I thought it was well modelled particularly those small things that I often don't value like minute keeping, facilitation, record keeping - those can be perceived by some as picky things that maybe aren't that important to be organized... but it's kind of like...it's what keeps things going, keeps things ticking and moving along. I've noticed in most meetings that I go to... there isn't a clear delineation of roles."

Finally, one experienced participant alluded to the investment required to make partnerships happen that is: "How partnerships build the capacity to do the work, but also that partnerships are a big piece of work".

Different learner needs and expectations

Comments about-unmet participant expectations and needs points to the challenge of responding to different learner needs and expectations. One experienced respondent expected to learn about proposal writing while another new participant states. "I remember thinking that we were learning how to do a proposal and I've already done that". For two new participants, "the workshop wasn't where we were at - it was beyond". One new participant indicated the workshop would have been better earlier in her job. Yet another new participant stated, "I thought it was more of a focus on sustaining once funding ends."

Learning and Retention

Can recall key concepts

There is evidence from the interviews that all projects participating in the workshop could recall key concepts from the workshop after four months, as described earlier, in relation to the three steps of partnership development.

Participants have learned key concepts

Again by their answers, interviewees indicated that they had learned the basic concepts of partnership development. At a minimum, respondents demonstrate a change in attitudes and knowledge as a result of attending the workshop.
In their descriptions of their partnership development work, respondents of all levels of experience allude largely to Step 1 of partnership development (knowing yourself and doing your homework). Respondents highlighted, for example, the importance of forging partnerships based on common objectives and goals.

Application

It must be noted that given that the workshop had occurred only four months prior to the follow-up evaluation, it may not be feasible to expect that all respondents have put workshop learning into practice in their projects. However, there is some evidence of application of concepts related to "doing your homework" (Step 1) and to the evaluation and enhancement of current partnerships (Step 3).

Applied concepts to create new partnerships

Some of the partnerships that respondents described were new since the workshop [noted by three respondents, two "new" and one with a "fair bit" of previous experience] but most were ongoing.

For four participants, of varying experience levels, the materials they developed at the workshop provided assistance or were the basis for new or already underway proposal development. "We were at the midst of applying for the Health Canada grant... One of the things was to realize who we were already partnering with..." "Developed a plan with [X and Y organizations] which became the proposal that they submitted to Health Canada."

In terms of doing one's homework, one respondent indicated, "we are exploring other avenues to work with other groups we could partner with".

Applied concepts to evaluate and enhance existing partnerships
When asked to describe any work they had done to evaluate and enhance their existing partnerships since the workshop, the majority of "experienced" respondents note that they have used the content/tools to begin formal or informal work in this area. Consider the following comments:

"It made us aware of which partnerships were balanced and contributing and which partnerships were a drain."

"I reviewed some of our existing partnerships as it was presented... The checklist you use is good."

It has led to more formal discussions with actual partners about taking on new roles.

It has led to more homework to identify other potential partners who should be involved in the project. For the other participants - those with little or no previous experience in partnerships, they are "not at that stage yet" or they are using project evaluation as a whole as a means to evaluate partnerships. With a couple of exceptions -- one respondent indicated their group was now "formalizing existing partnerships" and another reported that:

"... partnership... needed more work and since that time we have reconfigured how often we meet as a body and re-looked at purpose... and have re-established a coordinating committee to have a clear role and responsibility to make sure all of the parts are working together. Without this core group doing this most of the work was falling on a few people and they were getting burnt out... It's been a positive shift..."

Changes in partnership development, attitudes, knowledge and skills

As mentioned earlier, it is important to take into account respondents' previous experience with partnership development when considering their satisfaction with the workshop. Recall that four of the projects described themselves as "very experienced" with partnership development. These projects talked of having developed extensive partnerships before attending the workshop as reflected in comments such as "we could have presented professionally on partnerships at the conference" and "it's a natural part of what we do". Three of the projects identified themselves as having little or no experience (e.g. "I thought it meant financial partnerships") and one project indicated it had "a fair bit" of experience based on its community development experience yet identified that some of the concepts presented were new to them.

When asked whether they have the same views toward partnership development now than they did prior to the workshop, "very experienced" respondents indicate the workshop served to support and confirm the views they had, rather than change them. It also served to provide a new perspective on knowledge they already had prior to the workshop:

"It's not that my approach is different, but maybe the way I think about it is different. When I thought about developing partnerships previously, I have three steps that are very similar: what do I want and need, what's the benefit of the partnership and how can we move ahead - I think that that can be a fairly aggressive method especially given the type of person I am. But the steps where am I, where are you and how do we get there, which I think is a more sensitive way of approaching.... It's doing the same thing but thinking about it differently... So it's a friendly positive approach."

"We always knew partnering was really important - we've just expanded on who we're partnering with."

In terms of conflict resolution: "...not new information but provided insights I hadn't thought of before... The common factors and steps/principles... - aware of them but don't define, once defined it's easier to pick them out and address them."

"To be more patient - that people interpret everything different..." and "Being more understanding."

For respondents with "little or no experience" with partnership development prior to the workshop, there was a broadening of views on what successful partnership development involves as a result of attending the workshop. For two of these respondents, their "financial support" view of partnership development prior to the workshop shifted to a broader understanding of what partnership development entails - including the importance of knowing yourself and knowing what you want (Step 1). Consider their reflections:

"...Knowing that you can't start formal partnerships until you know what your role is going to be within that partnership. I had made an error when I first started the job - I was supposed to just start calling potential employers in the city, introducing myself and the program and seeing if they'd be interested in partnering with us. And they would say, that's good but what would you provide but I didn't know what we would give or want... I learned after the workshop that we needed to figure out what exactly do we want from employers, is there a particular industry, all that kind of stuff... and what we can offer."

"I have a better understanding afterwards about what a partnership would look like. There was a realization that a partnership doesn't have to involve finances and just working with someone to forward your case could be a partnership."
For another respondent new to partnership development, the workshop served to increase her confidence in her partnership abilities:
"For me I realized that I had more to offer than I thought I did. When I went to the workshop and I was sitting at tables with people that were in more powerful positions, and I realized that I had things to contribute to the discussion even though I don't have a high ranking position, don't have a ton of experience in writing proposals or in partnerships, I did have insight and meaningful things to contribute which I don't think I valued so much before. I gained confidence. I think I learned this partly from the skill development sheets at the workshop and partly from the discussion at the tables and realized that I have things to offer that are special and unique."

For the project that described itself as having a fair bit of experience, the workshop served to confirm their views, to allow them to bounce ideas off other participants, and to motivate their shift to action. "It just confirmed a lot of what I thought anyway - not changed, but confirmed." and "It helped me to realize to get out there and start figuring out who in this community would be a good fit for us and to do some research about that.... It was really more motivational..."

It is also interesting to note that in an entirely different context - the evaluation workshop follow-up -- two respondents spontaneously made comments on the partnership development workshop, comments that indicate the application of learning.

"We decided to not develop some of our partnerships, because we went through this Partnership Workshop and it was saying that it's a lot of work to develop proper partnerships. And a lot of partnerships that are out there nowadays are the self-serving kind of 'I'll scratch your back, if you scratch mine'. And that they cannot really help your project very much. And it is a lot of work to develop quality partnerships. So we said, 'okay, let's really focus on the partnerships that are going to push this project to the goal we are looking towards. And so we actually sort of slowed down on some of our partnerships, and said 'let's really focus on [partnership name] and we poured a ton of effort into that. And [second partnership name] - we continued to develop that one and put a lot more of our energy into that, and let some of the other ones slide for now ... to pursue them when our primary goals for this project have been accomplished. Then we'll do another project, or another several projects."

"The thing that we learned the most about the conference we went to on partnerships and sustainability is that you identify the needs of both parties. You know if you can take away one good sentence from every workshop, you've really learned something. It was successful in my mind. That was the key point; you identify both parties' needs. And boy [in this new partnership] we were both able to meet our own needs, both parties."

Results

Kirkpatrick argues for the inclusion of a fourth level where participants generalize their application of learning to other aspects of their lives or to other projects. No participant indicated this level of generalized ability. We must again note that given that the workshop had occurred only four months prior to the follow-up evaluation, it would not seem reasonable to expect that one could observe this level of learning. However, necessary precursors to this kind of learning, including "doing your homework" (Step 1) and the evaluation and enhancement of current partnerships (Step 3), are evident in application.

Factors that Helped and Hindered Projects

All projects were asked about what factors had helped their partnership development work move ahead as well as what factors had hindered. This provided a link in the interview process to drawing out comments about PPHB practice.

Factors that helped projects

Three main themes arise from respondents' comments on factors that have helped them move their partnership development work forward: The importance of knowing yourself and knowing what you want (various elements of Step 1) the importance of having resources dedicated to making the work happen, and the value of evaluating existing partnerships.
The majority of comments, solicited by respondents of various experience levels, relate to the first theme - the importance of knowing yourself and knowing what you want. Comments point to the importance of:

- Having a diversity of contacts and networks, and having an ability to broaden the range of partnership possibilities and to appreciate the importance of relationships - "But the relationships and getting to know each other better and the people and where you're coming from and respecting that they might do something really different. If it works then it's fine and we shouldn't all function the same just because we're partners - can be compatible without having to be the same to make something work" and "It's interesting to work together with partners from different backgrounds and try to find a common solution";
- Being clear about your goals and direction - "It's important for other people to know where you stand, what you're willing to put into the project";
- Demonstrating the benefits of your work, the difference you are making;
- Focussing on similar interests and objectives;

- Building on mutual strengths and expertise, and;
- Having the decision-makers, the passionate players at the table.

Three participants, all with little or no experience, touched on the importance of resources - money, people and skills:

- to network and make those relationships happen -- "Partnerships do take a lot of work", "Patience - I'm thinking of that in terms of trying to get a hold of people and connect - it's such a long and involved process in getting a project going";
- to act as mentors -- "Being connected with someone like [name] who understands the work and you don't have to explain why we're having problems... involved in the mediation and problem-solving and moving forward."

One new participant pointed to the importance of evaluating existing partnerships, as mentioned earlier.

Factors that hindered projects

Many of the themes arising from respondents' comments about factors that have not helped them move their partnership development work forward serve to confirm previously identified helpful factors, including: doing one's homework and ensuring there are adequate resources to carry out the work.

Two projects identified that not doing their homework was a hindrance. One project, new to partnership development, spoke of an inability to get their organization to spend the time required to "do their homework" and to narrow their focus. One experienced project indicated they had made a mistake by not doing their homework before putting their project forth for funding.

By far, the most prominent theme in this section - for all experience levels -- was related to resources and capacity - that is, the money, the people, the knowledge, the skills and the time required to coordinate, support and sustain the work. And with scarce resources comes a tendency to put out fires instead of planning proactively, as well as to compete instead of sharing resources and collaborating with others. Some spoke to the time required for the developmental process to form the trust in relationships, and to do the groundwork. Some spoke to a lack of "core funding":

"People are not sustainable without core funding... We can have all the partnerships in the world but if we have nothing to offer our partnerships... everyone is looking for money to stay afloat."

Additionally, one "new" participant mentioned that she did not have a clear understanding of PPHB's role and the program consultant's responsibilities in relation to assisting with capacity-building.

New themes that emerged in the interview results include:

- establishing compatibility,
- adapting to changing organizational and societal contexts, and
- making the partnership work.

In terms of establishing compatibility, respondents spoke of perceived or actual "lack of fit" by a potential partner - e.g., message not well received, organizational policies in opposition, stereotypes, cultural barriers, non decision-making person at the table for initial talks.

Four participants' comments, representing different levels of experience, spoke to the difficulty of dealing with change; that is, changing organizational and societal contexts such as a change in organizational direction of partners, unstable funding for partners, funding aimed primarily at crisis services rather than preventative work.

One respondent spoke to the challenge of making partnerships work, pointing to the importance of communication.

E. About Supporting Projects

One of the reasons for undertaking this evaluation was to assess PPHB practices that have been helpful and those that have hindered progress. The interviews focused only on the project experience of participants and did not ask them to speculate about what other actions might have been helpful. Despite the lack of direct questions or prompts about possible actions, several suggestions were made.

Points of convergence

In examining participants' comments, it becomes clear that there are three points of convergence for evaluation workshop and partnership development workshop participants with respect to PPHB practices that can support projects:

- continuing education is a vital support for practice;
- continuing education events must take into account different learning needs, and;
- necessary resources must be in place to meet project requirements.

1. Continuing education is a vital support for practice.

Most projects appreciated being able to attend the evaluation workshop. "A workshop [on evaluation] at the beginning was really valuable. Also the follow up workshop [on Partnerships] was valuable." "It [workshop on evaluation] really helped ... the structure of the program logic model and the fact that both of us went." And, "[Program consultant] said it would be helpful, but to tell you the truth, I wouldn't have gone even though I knew it was helpful...I went though ... and now that I look back on it... the information was worth the time."

Participants appreciated being able to attend the partnership development workshop. They view workshops as beneficial in developing a broader range of skills and networks. Here are one experienced respondent's comments in this regard:

"We recognize the leadership of Health Canada to attempt this - to see them bring this revelation of partnerships to other agencies was great - so celebrate the success - We were really amazed at the ingenuity of the designers of the conference."

2. Continuing education events must take into account different learning needs.

Evaluation workshop participants identified the importance of the program consultant making a better assessment about project learning needs and stage of development, and better matching learning content and opportunities to needs and stages of development. "[Program consultant] could have had a better understanding of what we were doing... an open mind and not a closed mind... more careful listening to our evaluation experience" [respondent was professional educator].

In the case of the partnership development workshop, it is clear that the workshop design was unable to meet all of the different learning needs. Different levels of prior experience with partnership development mean different learning needs and therefore, a one-size-fits-all workshop is not the solution. From one experienced participant: "There were good things and I think people new to partnering got a lot out of it, but people who are grandmothers to partnering it wasn't as useful". And from a "new" participant: "It was a good experience for us. There was a tremendous amount of stuff there that really didn't hit where we are, but it was still valuable to be there. Now we know that this is out there so we can draw on it when we need it. Prior to that, we didn't know these things could be issues."

3. Necessary resources must be in place to meet project requirements.

Indeed, participants from both workshops expressed that if PPHB requires that evaluation and partnership development occur as part of funded projects, and then the necessary resources must be made available to make them happen.

For example, some participants perceived a lack of recognition of partnership development, as "a long-term part of the growth process and it should be funded just as much as the delivery of the work."

Other helpful practices

The following is an overview of other helpful practices identified by participants from the evaluation workshop. In light of the significantly greater time lapse since the evaluation workshop was held, it is not surprising that evaluation workshop participants generated more comments than partnership workshop participants.

a. From the evaluation workshop respondents

Five of six projects were very complimentary about actions that PPHB and its staff undertook to support projects. One project was not. For projects that perceived support, several actions were specifically referenced.

- Access to planning and evaluation resources: The program consultant located and sent along written and other project resources on request, as well as passing along materials that she thought would be helpful. This was appreciated by five of the projects. At least two of the projects are using PPHB-supplied evaluation reporting frameworks, and both identified that these were helpful. "[Program consultant] sent out six types of evaluation reporting formats. I looked them over and then picked the one that seemed to be the best for us...."
- Personal consultation and support, project problem solving: "The personal consultation and support is vital... It brings ideas, and experiences of others in health promotion."
- Site visits: The site visits were appreciated because they permitted one-on-one discussion of project issues, and the program consultant helped with problem solving based on experience with other projects. "The site visits helped the group feel more confident and together." [Program consultants] were very helpful in our site visits...very willing to respond to our needs - it was very, very helpful to know that resource [program consultant support] is available...very useful to have an outside view."

Several interviewees volunteered that the relationship they had with the program consultant was "excellent", and that "I felt lots of support... This was a new experience for me in working with Health Canada." Another interviewee volunteered, "Health Canada understands this stuff [bringing about community change]." Another interviewee said: "they [program consultants and Health Canada staff] do a good job ...We appreciate it. There's not a whole lot negative I can say...".

It is also interesting to note that one of the respondents spoke of their appreciation of PPHB's understanding of community change and capacity building in the context of comments made on the partnership development workshop.

"There is a real lack of understanding among our people with the money about what it takes to bring about real change, valid change, and that's something I really appreciate about Health Canada. They understand this stuff. ... [What makes you say that?] Well because of the kind of workshops that we went to; that [partnership workshop] already teaches what we knew. The principles that we work by were all there, in this partnership and sustainability [workshop]. We were speaking the same language. They already know about respecting the community and working from the strengths of the community. And they not only know it, but they recognize when it's happening in a project. ... It's kind of rare in this business [of making community change] to find that."

Other less helpful practices

The following is an overview of other less helpful practices identified by participants from each of the workshops.

a. From the evaluation workshop respondents

A PPHB practice to support projects that interviewees felt were not helpful included:

Short time frames (1-3 years) don't match projects' needs for sustained funding to make community change and sustain it. "We are well on our way now…but it's unfortunate that we have such a short time frame." "It takes 2-3 years to build momentum that you need to make change… And then your funding's done."
Some interviewees' volunteered additional comments about future practices that projects would find supportive:

"I would strongly encourage continuing to fund training for permanent on-going staff and project staff [to ensure capacity building]. I could apply it [the evaluation workshop knowledge and skills] to my own practice because I wasn't a manager. And when the project is finished, I'll still be here…"
Continue to fund "citizen instigated projects for the betterment of the health of Canadians…"

Continue to fund small projects, and provide funds in small amounts: "We were such a small project in terms of cost, yet we did good work. They [Health Canada] got a lot for their money for these small projects."

Support projects with education only if needed: "And if the project's goals are not being met, then they need help. Only then."

"I wonder if there was someone you knew that did not have any say in your funding, if you would be more inclined to make that phone call [for support or advice].

b. From the partnership development workshop respondents

PPHB practices to support projects that interviewees felt were not helpful included:

A workshop planning and delivery process that did not include the community's expertise: "Use community, contract out to, we are the experts. Felt you had the wrong people telling the wrong people. Felt it would have been better off having us, with a bunch of Health Canada people as the participants, having the community groups tell you about partnering - we may not have put in text, but the life experience would have been lengthy and rich." "If partnering then having a committee of both government and community to organize."

No follow-up to the workshop: For one experienced respondent, the workshop "could have been turned to a follow-up event because you need the time to process and move forward."

A lack of clarity around the role of the program consultant: For one "new" participant, this lack of clarity had resulted in missed opportunities for supports beyond those provided to assist with project evaluation. This participant also felt it would be important for the program consultant to be involved with front-line project staff from the start to facilitate project start-up and implementation.

For three participants, there was expressed concern about the assumed significant costs of holding the workshop, and some suggestions as to how money might be more effectively spent, all the while recognizing the value of workshops. Consider one respondent's comments:

"I would find that maybe that money, although workshops are very beneficial, could be better used in some other means. Not sure of the means... money that could be used further in the programs, more to develop one-on-one time between program consultant and project or if other workshops were being held - being able to access the money to attend those workshops which are in your region that aren't going to cost so much in travel."

Unanticipated outcomes

a. From the evaluation workshop respondents

Nearly all interventions in capacity building can have unanticipated outcomes, some positive and some negative. On the positive side of workshop unanticipated outcomes, one project was able to identify the shortcomings of staff and use the evaluation tools and data to hold her better accountable for her efforts on project activities. Another project discovered the importance of planning and writing down their plans so that others can understand the direction and vision.

"... having a plan to show staff and volunteers who didn't fully grasp the vision was helpful to them ... having to do those things [planning and evaluation] was helpful to have staff or volunteers who need more guidance. It helps them get on board or catch up with everyone else [when they join project]. ...It helps us to retain and recruit staff and volunteers."

Another project leader was confronted by the differing perception about project intervention activities. She thought that clients would be very pleased to have the extra services, as they would help clients manage their lives in better, healthier ways. When she worked through the assumptions in the Program Logic Model, she realized that this view was definitely not shared by most of the clients of the program. She was able to take this realization and with the help of the staff team and community advisor work through how to increase access to the new services while lessening the perceived potential negative consequences. This was a major realization and enhanced capacity for this leader to plan future interventions and revise existing ones.

F. Analysis of Findings

The follow-up evaluation of the two PPHB workshops - on evaluation and partnership development - focused on two fundamental questions:

Were the workshops efficacious in increasing knowledge and skills in evaluation or building and sustaining partnerships, as well as shifting attitudes towards either evaluation or partnerships?

What PPHB actions are perceived by participants to be helpful or hindering, from the perspective of their project work?

Based on the findings of the follow-up evaluation, the answer to both these questions is "yes".

1. The workshops were efficacious in increasing knowledge and skills in evaluation and partnership development, as well as shifting attitudes towards evaluation and partnership development.

Attitudes, knowledge and skills in the areas of evaluation and partnership development for projects can be enhanced through continuing education.

In both workshops, participants who had less experience benefited the most from learning activities. However, even for participants and projects with greater experience, learning can still be important to project development - including serving a function of affirming one's practice.

Relevant and rich learning experiences can have substantial impacts on projects, and improve their planning and evaluation knowledge, skills, and processes.

As observed in the evaluation workshop, applied learning is efficacious in changing attitudes and building skills and knowledge, especially when it is supported by additional project requirements for reporting.

2. PPHB actions are largely perceived as helpful in pursuing project work.

The range of supports provided by PPHB is appreciated - including the role of the program consultant, providing tailored consultation and support, as well as the provision of workshops to support practice.

The findings also allow us to begin to better understand some less supportive practices such as short-term funding.

G. Recommendations for Practice

Based on the follow-up evaluation results, the following six recommendations are made to the PPHB to improve support to funded projects:

1. Continue to provide access to workshops.

Attitudes, knowledge and skills in the areas of evaluation and partnership development for projects can be enhanced through continuing education. Providing learning events such as workshops is an important component of supporting projects in their practice.

2. Carefully assess learning needs when planning workshops.

Learning activities that are targeted to project learning needs at specific points in the projects' life cycles are most beneficial. It is important to assess learning needs for each project, and determine whether individual projects would find the workshop content relevant at specific points in their life cycle. Providing resources for planning and evaluation education at the beginning of projects' life cycles is beneficial.

Workshop design must take into account different learning needs. Learning activities must vary based on participants' previous experience. One size cannot fit all. For example, in the case of the partnership development workshop, it would have been more helpful for new learners to be focus on direct application of their learning to their work and on the practical development of their own strategy. For more experienced learners, there appears to be a lot of value in the networking opportunities afforded by the workshop and in the opportunities to address specific implementation issues such as conflict resolution.

3. Involve the community in the planning and delivery of continuing education events.

Involving experienced projects in the planning and delivery of workshops and other learning events contributes to a richer process and works to enhance capacity. This could take the form of joint government and community planning committees, as well as having experienced funded groups participate in the delivery of the learning events.

4. Continue to provide the supports that PPHB program consultants offer.

A central role for program consultants is to build project capacity. This role is seen as a positive support by most projects, which often result in better project performance. Program consultants have the ability to provide tailored, one-on-one coaching through site visits, as well as facilitating access to larger support initiatives such as workshops.

5. Provide additional supports to enhance and ease practice.

A range of ongoing supports is required to build projects' capacity. Workshops and one-on-one consultation provided by program consultants are key supports. Additional supports that could be considered include follow-up workshop events to facilitate the transition to application and results as well as the provision of cost-effective supports including access to regional workshops. Projects also express the importance of funding evaluation and partnership development work.

6. Require evaluation from funded projects.

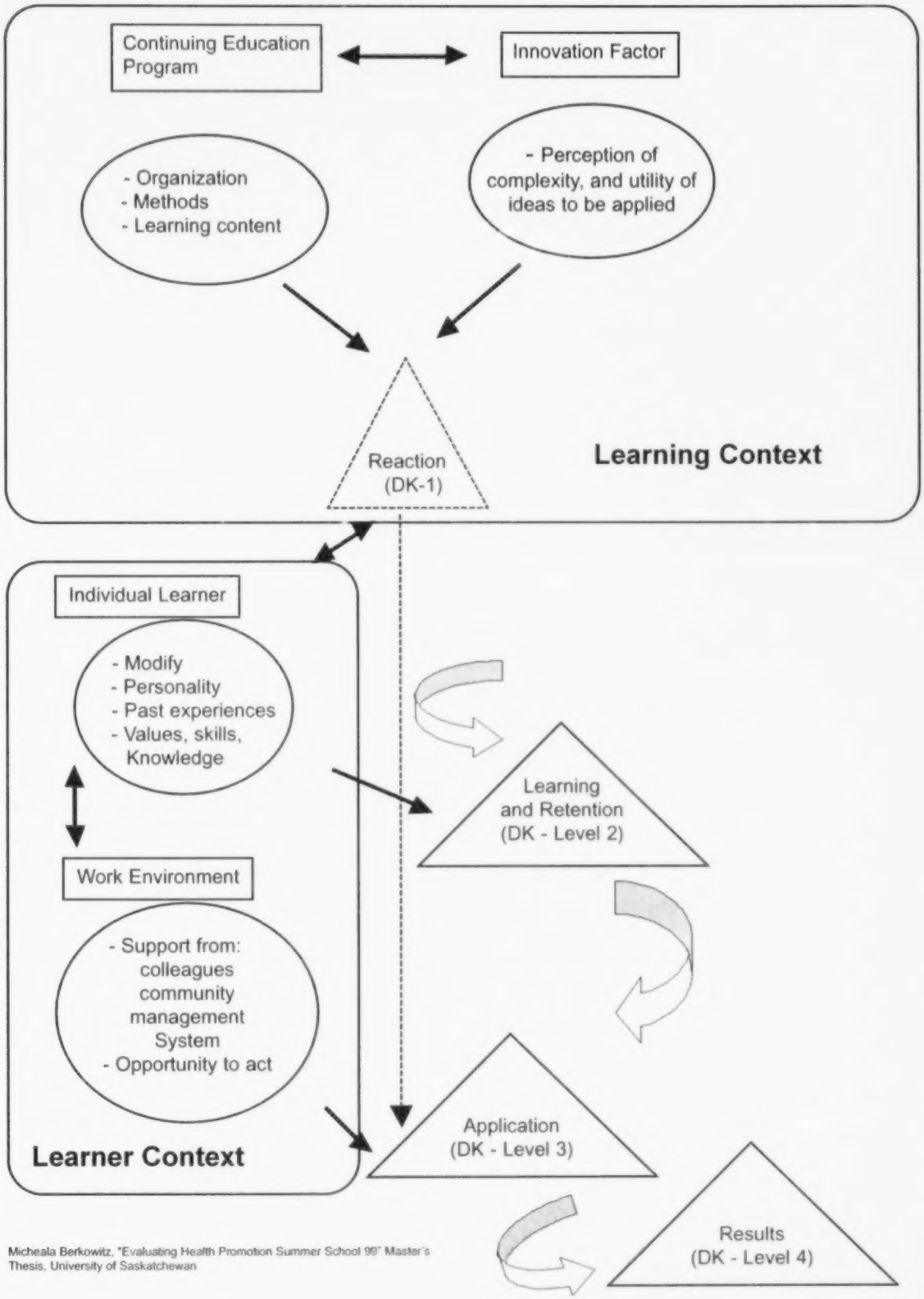
Requiring evaluations from projects is not only good stewardship; it can foster project improvements. Without external requirements, projects may be willing to sacrifice evaluation time to other activities.

H. Conclusion

The results of this follow-up evaluation support the notion that workshops are efficacious in increasing knowledge and skills as well as shifting attitudes towards areas of practice - in this case, in the areas of evaluation and partnership development.

Moreover, the follow-up evaluation results provide insights into PPHB supportive practices, and tell us that PPHB actions are largely perceived as supportive and helpful in projects' pursuit of their work. However, it will be necessary to gather information from many projects over time to answer the complex and important question of how PPHB can improve their practice of supporting projects.

Appendix A: Learning Context Model



Appendix B: Evaluation Framework

Evaluation will occur in two linked components: one dealing with the effects of the Planning and Evaluation Workshop (September 2001) on funded projects, and the other focused on effects of the Partnership Workshop (September 2002). In each component, the evaluation will focus on the effects on projects and the project personnel that flow from attending the Evaluation Workshop (September 2001) and the Partnership Workshop (September 2002). The Evaluation Workshop component will be the responsibility of Meredith Moore of Moore Chamberlin & Associates and Karen Andres of Health Canada PPHB Manitoba-Saskatchewan Region. The Partnership Workshop component will be the responsibility of Francine Deroche of Consultation Deroche Consulting and Rhonda Chorney of Health Canada PPHB Manitoba-Saskatchewan Region.

Health Canada staff members involved seek to answer two fundamental questions:

1. Were the workshops efficacious in increasing knowledge and skills in evaluation / in building partnerships, and in improving attitudes towards evaluation / partnerships?

2. What Health Canada actions were perceived to be helpful or hindering, from the perspective of projects?

Health Canada staff members are also interested in beginning to amass information that will help them improve their practice in supporting projects through the various life stages from conceptualization and letters of intent, to full proposals, to funding and implementation, and through evaluation. It is recognized that the experience of working with many projects over time will be required to answer this more complex and important question. However, it is anticipated that this evaluation will be able to inquire about helpful and hindering actions, and that over time and many projects such information can be helpful in shedding light on improved supportive practice.

For the Evaluation Workshop

Evaluative Question/Issue	Indicators for Project	Indicators for Staff/Others
What, if any, outcomes have occurred from having at least one member of the project participate at the workshop (evaluation or Partnerships)? Were the workshop objectives accomplished? -describe logic of project activities and goals -identify key elements in project evaluation activitiescreate an outline for evaluating project	Level 1 - draft evaluation concept/design for project (e.g., a copy of the logic model prepared at the workshop)	Level 1 (DK) Reaction? - satisfaction/reaction to workshop? - staff can explain the "program theory or logic of their project? - staff can describe specific evaluation activities they proposed to undertake, or delegate to others
Have workshop participants learned key workshop concepts?Have the participants retained the key concepts?		Level 2 (DK)- Learning and retaining? - recall key concepts from the workshop (program logic, links between objectives of different time periods, differences between objectives and activities, importance of evaluation from beginning of project)? - can tie workshop concepts in with prior knowledge?can give examples of workshop concepts? - can recall describing workshop key concepts to others in organization (some only applicable)

Evaluative Question/Issue	Indicators for Project	Indicators for Staff/Others
Have workshop participants applied key concepts to create evaluation design? What efforts have been made to carry out evaluation tasks? Have participants' attitudes and beliefs changed about evaluation in relation to the specific project?	Level 3 - existence of evaluation design; description of process to develop - evaluation activities - use of evaluation information for project development and revision/change - use of evaluation in other non-project activities or program	Level 3 (DK) - Application -attitudes toward evaluation are more positive (assigns more importance to evaluation, more interested, more confident, willing to become involved) - have tried to create an evaluation design - have created a design - have finalized a design - have collected data - have done data analysis and interpretation - have prepared evaluation report - have encouraged others to use evaluative approach to work
Have workshop participants applied key concepts to other project/program activity?		Level 4 (DK)- Results - have used workshop concepts in other projects/programs - have used evaluation information to guide other program developments outside HC funded project
What are outcomes for participants of attending the workshop?	Changes in attitudes, knowledge or skill in evaluation for projects and wider agency staff	Changes in attitudes, knowledge or skills in evaluation for participants
What are helped/hindered projects??other cap.bldg activities, environments, resource base (internal/external), other HC interventions		Self reported helpful factorsSelf reported hindering factors
What actions have Health Canada taken that is perceived to be helpful or hindering to projects?Why are those actions helpful or hindering?		Self reported helpful/hindering factors

Sequence of Interview Questions for the Evaluation Workshop

Reminder about the workshop under discussion, its focus, time frame, etc.
Health Canada needs your feedback to help answer some questions about the workshop we did together. I want to discuss how helpful or unhelpful that workshop was for your project. I will be asking you some questions about what you recall from that workshop, about how your evaluation/partnership work is coming along - or maybe not coming along, and how Health Canada has been helpful or has hindered your project's progress. Our interview will take about 45-60 minutes. Do you have time now, or can we arrange a better time?

Arrange permission to tape
clear definition of confidentiality and anonymity
permission to use quotes (and clear use of quotes where the quote may be identifiable to some)
explanation of use of final report and data results
importance of frankness in reply so that people can learn how to be more helpful to projects in the future; assurance that no information will be used to negatively affect the project.

Description of project and where project is now

1. It has been quite some time since we last talked together. Can you refresh my memory about your project and tell me briefly about what was your primary purpose and what have been some of your key activities? (probe for original objectives and activities, prompt for successes, listen for initial changes)

2. I'm wondering about how things are going now in your project? Where are you at in terms of moving ahead to accomplish the change you wanted to create? (listen for how program theory is playing out in the "real world" by noting project activities having similar/dissimilar outcomes than anticipated, particular factors confounding or enhancing success, challenges anticipated/unanticipated, changes to program plans; probe for what is causing changes in program plans or directions - if any)

3. In your experience, what has helped your project move ahead in the last year or so? (probe for why factors were helpful; probe for any Health Canada activities including the workshop on evaluation; probe for use of initial findings; potential areas other capacity interventions, environment, resource base - internal to project or external in sponsoring agency, other Health Canada interventions)

4. As you reflect on the work of your project over the last year, have there been any factors that have hindered your project from moving ahead as you had planned or things that have slowed work down? (probe for what was missing, or what might have been helpful in dealing better with hindering factors; probe specifically for Health Canada actions that may have been hindering

Now I want to move ahead to talking more specifically about the workshop we did together.

5A. What brought you to the workshop?

5B. Is there anything that stands out in your mind from the workshop?

6. Is there anything else you remember from the workshop? (probe for learning about evaluation, about the use of logic models, links between objectives over time, differences between objectives and activities, importance of evaluation from beginning of project)

7. During the workshop we tried to give everyone an opportunity to begin to create a strong description of what they want to accomplish and how they would evaluate their progress toward their objectives. When you went back to work after the workshop, what did you do with the materials you developed at the workshop?

8A. Since the workshop, can you describe for me the efforts you have made in working on evaluation in your project? I know that some projects will have not been able to make a lot of progress, while others may have been able to move along quite easily. (probe for existence of evaluation concepts, designs, plans; development of potential or actual questions; development of evaluation tools and processes for data collection; implementation of initial evaluation processes)

8B. You had to create an interim report for Health Canada based on your mid-point findings. What use have you and the project made of these interim findings?

9. In making these efforts, what helped you to move ahead? (probe specifically for workshop effects, or Health Canada effects)

10. In making these efforts, what hindered you from being able to move ahead as well as you would have liked? (probe specifically for workshop effects, or Health Canada effects)

11. Can you recall any ways in which your project changed as a result of moving ahead on the evaluation work?
(Probe for use of interim findings, evaluation processes creating change in project design or activities or processes)

Now I want to ask a few questions about your own background and experience in dealing with evaluation.

12. Before you attended the workshop in the fall of 2001, what was your own experience with evaluation? Would you describe yourself as being very comfortable with evaluation - say swimming in the deep end of the pool, or not very comfortable - preferring the shallow end, or perhaps even being terrified of swimming? (probe for experience level, and prior experiences - good/poor etc.)

13. Can you tell me about your attitudes were toward evaluation before the workshop? (probe for importance of evaluation, interest in/aversion to, overall lack of knowledge)

14. Would you say that you have about the same views or attitudes toward evaluation as you did last year before the workshop, or have your attitudes changed in any way? (probe for changes in interest, importance assigned to evaluation, usefulness of evaluation)

We are coming to the end of our questions.

15. Reflecting back over the last 16 months, can you identify anything (else) that has changed for you or the project as a result of the workshop on evaluation? (listen for enlightenment effects, shifts in conceptualizing project work, use of evaluation in other endeavours or projects/programs)

16. Now I want to move past the specifics of the evaluation workshop. Are there any other lessons you have learned about the processes of making change to improve the well being or health of your community/communities? (listen for further changes in attitudes/ knowledge or skills in program planning, implementation, evaluation)

17. Are there any other comments you would like to make to Health Canada or to people who plan workshops?

Do you want a copy of the report on this evaluation process?

Thanks for your time.

Sequence of Interview Questions for the Partnership Development Workshop

Introduction

Hello, I'm Rhonda Chorney. Thank you for agreeing to participate in this interview. As you know, the Population and Public Health Branch (PPHB) of Health Canada is following up with a sample of participants who attended the Partnership Development Workshop held in Saskatoon in September 2002.

My colleague Karen Andres and others at the PPHB need your feedback to answer some questions about the workshop. I want to discuss how helpful that workshop was for your work. I will be asking you some questions about what you recall from that workshop, about how your partnership development work is coming along - or maybe not coming along, and how Health Canada has been helpful or has hindered your progress.

The interview will last no longer than 1 hour (for one-on-one interview) / two hours (for group interview).

Arrange permission to tape (if applicable)
Provide clear definition of confidentiality and anonymity
Ask permission to use quotes (and clear use of quotes where the quote may be identifiable to some)
Explain use of final report and data results
Stress importance of frankness in reply so that people can learn how to be more helpful to projects in the future; provide assurance that no information will be used to negatively affect the project.
Confirm that they received the questionnaire ahead of time.

Questions

Description of work and where work is now

1. A few months have passed since the Partnership Development Workshop was held. Can you tell me what brought you to the workshop? What were your primary objectives in attending? (probe for original objectives and activities, prompt for successes, listen for initial changes)

2. I'm wondering about how things are going now in your work. Where are you at in terms of moving ahead with a partnership development strategy - in relation to current partnerships? In relation to new partnerships, if any? (listen for how partnership development key concepts are playing out in the "real world" by noting steps taken to develop partnerships - knowing yourself, knowing what you want, establishing compatibility, getting the details right, making it work, evaluating and enhancing a partnership, closure --, particular factors confounding or enhancing success, challenges anticipated/unanticipated, changes to plans; probe for what is causing changes in plans - if any)

3. In your experience, what has helped your partnership development work move ahead in the last five months or so? (probe for why factors were helpful; probe for any Health Canada activities including the workshop on partnership development)

4. As you reflect on your partnership development work over the last five months or so, have there been any factors that have hindered your work from moving ahead as you had planned or things that have slowed work down? (probe for what was missing, or what might have been helpful in dealing better with hindering factors; probe specifically for Health Canada actions that may have been hindering)

Now I want to move ahead to talking more specifically about the Partnership Development Workshop.

5. Is there anything that stands out in your mind from the workshop?

6. Is there anything else you remember from the workshop? (probe for learning about partnership development strategy - taking stock, knowing what you want, establishing compatibility, conflict resolution, leadership, roles and responsibilities, making it work, evaluating and enhancing a partnership, closure)

7. During the workshop, we tried to give everyone an opportunity to begin to create an action plan for partnership development - knowing yourself, knowing what you want from a partnership, establishing compatibility, figuring out the details of how to make it work, and evaluation. When you went back to work after the workshop, what did you do with the materials you developed at the workshop?

8. a) Since the workshop, can you describe for me the efforts you have made in working on partnership development? I know that some projects/organizations/groups will have not been able to make a lot of progress, while others may have been able to move along quite easily. (probe for existence of partnership development concepts and plans; evaluation, enhancement/shifts and closure of existing partnerships; development of new partnerships)

8. b) Since the workshop, can you describe for me any work you've done to evaluate and enhance your existing partnerships? (probe for shifts and application of lessons learned to new partnerships)

9. In making these efforts, what helped you to move ahead? (probe specifically for workshop effects, Health Canada effects, Labonte workbook, other capacity-building supports, environmental context including opportunities and attitudes, resource baseline at the outset)

10. In making these efforts, what hindered you from being able to move ahead as well as you would

have liked? (probe specifically for workshop effects, Health Canada effects, Labonte workbook, other capacity-building supports, environmental context including opportunities and attitudes, resource baseline at the outset)

11. Can you recall any ways in which your work changed as a result of moving ahead on partnership development?

Now I want to ask a few questions about your own background and experience in dealing with partnership development.

12. Before you attended the workshop in the fall of 2002, what was your own experience with partnership development? (probe for experience level, and prior experiences - good/poor etc.)

13. a) Can you describe what your thinking was about partnership development before the workshop? (probe for importance of partnership development, interest in/aversion to, overall lack of knowledge)

13. b) Would you say that you have about the same views toward partnership development as you did last year before the workshop, or have your views changed in any way? (probe for changes in interest, importance assigned to partnership development, usefulness of partnership development for project sustainability)

We are coming to the end of our questions. I really only have one more in relation to what if anything has changed as a result of your attendance at the workshop.

14. Reflecting back over the last five months, can you identify anything (else) that has changed for you or your work as a result of the workshop on partnership? (listen for enlightenment effects, shifts in conceptualizing project work, application of partnership development in other endeavours or projects/programs)

15. What are some of the most important lessons you have learned about undertaking a project/work like yours? What advice would you pass along to others so that they could have a better or easier time in making the kind of changes that your work/project is trying to accomplish?

16. Are there any other comments you would like to make to Health Canada or to people who plan workshops?

Closure

Thanks so much for your time. Would you be interested in obtaining a summary of the final report? If so, please provide me with your contact information.

Appendix C: The Logic Model Format